

The Billing Profile

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The base of Jackrabbit Care billing is the Billing Profile which sets the parameters for when a bill is automatically sent and when it's due. Each Billing Profile in a Family Account carries its own balance with an assigned Payer. Fees, credits, and payments are all applied to a specific Billing Profile; the sum of all Billing Profile balances is the total balance for the family.

[Expand/Collapse All](#)

Billing Profile Details

To locate a family's Billing Profiles, go to **Family Accounts** (left menu) > **Profiles** card > **View # Active Family Accounts**. Select the family and then their **Billing** tab. Click the **Expand** icon (⊙) to see more details about the family's balance, such as the balance for each Payer, last payment date, last invoice date, and the balance owed for each site.

967908 > Family Account

Jennings

DETAILS **BILLING** TRANSACTIONS INVOICES AUDIT LOG NOTES Actions

Family Balance
\$880.00

Sheldon Jennings Balance \$880.00
Last Payment Dec 04, 2024 \$600.00
Last Invoice Nov 16, 2024 \$510.00

Multi-site Balances

Science Kids (Northside)	\$0.00
Science Kids (Southside)	\$880.00
Science Kids (Westside)	\$0.00

Weekly Billing Profile 1

- Billing Profile Balance** 2: \$880.00
- Invoice Schedule** 3: Weekly
- Payment Due Day** 4: Sunday
- Days before to send invoice** 5: 1 Day
- Next Invoice Date** 6: Sat Dec 07, 2024
- Next Due Date** 7: Sun Dec 08, 2024
- Payer** 8: Sheldon Jennings

Monthly Billing Profile

- Billing Profile Balance**: \$0.00
- Invoice Schedule**: Monthly
- Payment Due Day**: 15th day of the month
- Days before to send invoice**: 3 Days
- Next Invoice Date**: Thu Dec 12, 2024
- Next Due Date**: Sun Dec 15, 2024
- Payer**: Sheldon Jennings

All Billing Profile cards contain the following:

- 1 The name of the Billing Profile.
- 2 **Billing Profile Balance** - The amount due for the Billing Profile.

- 3 **Invoice Schedule** - The timing of when invoices will be automatically sent out (monthly, weekly, or bi-weekly).
- 4 **Payment Due Day** - For a weekly or bi-weekly Invoice Schedule, the day of the week a payment is due is shown. For a monthly Invoice Schedule, the day of the month a payment is due is shown.
- 5 **Days before to send invoice**- The date when the invoice is sent to the Payer. Between 1-7 days is shown in this section.
- 6 **Next Invoice Date** - The date when the next invoice is scheduled to be sent to the Payer.
- 7 **Next Due Date**- The date on which the next payment for the invoice is expected or scheduled to be made.
- 8 **Payer** - The Payer on the account for the specific Billing Profile.



Payers

A Payer is a person on the family's account responsible for paying the balance. Payers are only responsible for the balance assigned to their Billing Profile, and family accounts can have multiple Billing Profiles.

- The initial Contact in the family defaults to the Payer.
- All Payer's will show a Payerbadge **PAYER** when viewing the [Contact's section](#) for a family.
- Only one Payer can be assigned to each Billing Profile.

[Add Another Payer](#)

To add a second payer to a family account, take these steps:

1. Create a second contact on the family account if you have not already done so.
 - Go to **Family Accounts** (left menu) > **Profiles** card > **View # Active Family Accounts**.
 - Click the **Actions** menu  > **Add Contact**.
 - Add the **Name, Mobile Phone,** and **Email** for the contact, then click **Next**.
 - Choose the **Relationship** and set if the contact is a *Legal Guardian, Authorized Pickup,* or *Emergency Contact*, then click **Save**.
2. Go to **Family Accounts** (left menu) > **Profiles** card > **View # Active Family Accounts**.
3. Select the family and then their **Billing** tab.
4. Click the **Options** icon  > **Edit Billing Profile** on the Billing Profile you would like to assign the new Payer to.
5. Select the additional Payer for the account and click **Save**.

Edit Billing Profile

Billing Profile Name *

Select a payer *

Katrina Dennis
▼

Cancel
Save



Although each Payer has their own Billing Profile, charges can still be applied to a single Billing Profile, and payments can be made by either party.

Split Billing

First, ensure the child is already **enrolled**, but no tuition is set for the class. Then add an additional Payer and assign them their own Billing Profile. Follow these steps to split the tuition for each Payer's Billing Profile:

1. Go to **Family Accounts** (left menu) > **View # Active Family Account** and select the family.
2. Go to the **Actions** menu Actions ▼ > **Add Fee**.
3. Select **New Tuition Fee** and click **Next**.
4. Select the child under *Search Families or Children* and click **Next**.
5. Change the *Tuition Fee Amount* to 1/2 of the tuition and click **Next**.
6. Finish these steps before clicking **Complete Fee**:
 - Select the first **Payer** and select a **Billing start date**, then click **Next**.
 - Optionally, add a **Billing end date**, or leave this toggle off if you want the billing to end when a child drops the class or the class ends.
 - Select **Dates of Service** (optional).
 - Add a **One-Time adjustment fee** (optional).
 - Add a **Discount** (optional).
7. Repeat these steps for the second Payer who is splitting the tuition.

Add a Billing Profile

Billing Profiles are automatically displayed on the Billing tab. Add additional Billing Profiles by doing the following:

1. Go to **Family Accounts** (left menu) > **View # Active Family Account** and select the family.
2. Go to the **Actions** menu Actions ▼ > **Add Billing Profile**.
3. Set the following information before clicking **Save**:

- **Billing Profile Name** - The name that will appear on the Billing Profile.
- **How often do you bill parents?**- Select *Weekly*, *Monthly*, or *Bi-Weekly*.
- **Select a payer** - The contact on the account responsible for the Billing Profile.



Additional Billing Profiles will display with a Custom badge **CUSTOM** .

Edit a Billing Profile

To edit a Billing Profile, go to a family's **Billing** tab and click the **Options** icon > **Edit Billing Profile** to:

- Rename a Billing Profile.
- Change the Payer for a Billing Profile.

The screenshot shows the 'Bedi' account interface for 'Family Account' (ID: 967908). The 'BILLING' tab is active. At the top, there's a 'Family Balance' of \$180.00. Below, two billing profiles are listed:

Weekly Billing Profile	Monthly Billing Profile
Billing Profile Balance \$180.00	Billing Profile Balance \$0.00
Invoice Schedule Weekly	Invoice Schedule Monthly
Payment Due Day Sunday	Payment Due Day 15th day of the month
Days before to send invoice 1 Day	Days before to send invoice 3 Days
Next Invoice Date Sat Dec 07, 2024	Next Invoice Date Thu Dec 12, 2024
Next Due Date Sun Dec 08, 2024	Next Due Date Sun Dec 15, 2024
Payer Zoya Bedi	Payer Abhay Bedi

An 'Options' menu is open for the Monthly Billing Profile, with 'Edit Billing Profile' highlighted by a hand cursor.

Delete or Archive Custom Billing Profiles

Custom Billing Profiles will display a Custom badge **CUSTOM** . Click the **Options** icon and either **Delete** or **Archive**.

- **Delete** - Completely remove the Billing Profile if it is not currently in use or has a balance.
- **Archive** - This will hide the Billing Profile when adding new fees or payments for the account, but it will still be visible on financial reports.

Hernandez

Actions

DETAILS **BILLING** TRANSACTIONS INVOICES AUDIT LOG NOTES

Family Balance **\$650.00**

Weekly Billing Profile

Billing Profile Balance
\$600.00

Invoice Schedule
Weekly

Payment Due Day
Sunday

Days before to send invoice
1 Day

Next Invoice Date
Sat Dec 07, 2024

Next Due Date
Sun Dec 08, 2024

Payer
Gloria Hernandez

Monthly Billing Profile

Billing Profile Balance
\$50.00

Invoice Schedule
Monthly

Payment Due Day
15th day of the month

Days before to send invoice
3 Days

Next Invoice Date
Thu Dec 12, 2024

Next Due Date
Sun Dec 15, 2024

Payer
Marco Hernandez

Subsidy Payments **CUSTOM**

Billing Profile Balance
\$0.00

Invoice Schedule
Weekly

Payment Due Day
Sunday

Days before to send invoice
1 Day

Next Invoice Date
Sat Dec 07, 2024

Next Due Date
Sun Dec 08, 2024

Payer
Stella Hernandez

Actions:
Edit Billing Profile
Delete
Archive